2016



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FINANCIALS

Fiscal year 2016

Starting Operating Balance \$1,015,645 (1/1/16)

Total Income \$1,308,341

Total Expenses \$1,381,228

Net Income -\$72,887

Ending Operating Balance \$942,758 (12/31/2016)

DUR VISION

Resource Generation envisions a world in which all communities are powerful, healthy, and living in alignment with the planet. A world that is racially and economically just in which wealth, land and power are shared.

OUR MISSION

Resource Generation organizes young people with wealth and class privilege in the U.S. to become transformative leaders working towards the equitable distribution of wealth, land and power.

RG'S CHAPTERS ARE GOING STRONG! Our chapters are recruiting and politicizing ever-increasing numbers of young people with wealth, running praxis groups, moving money in partnership with local funders, and advocating for economic justice as part of coalitions. We are building relationships and having fun while doing it, but don't have to take our word for it, hear from our members that make it all happen!

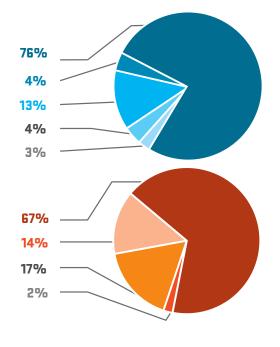
CHAPTERS

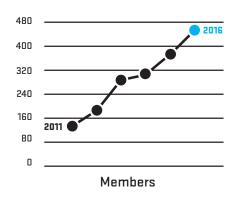
Income

Renewals \$991,866 Foundations \$50,000 Earned Income \$171,411 Sponsorships \$56,800 New Donors \$39,973

Expenses

Organizing \$924,207
Program Events
(Conferences) \$188,534
Administration \$ 232,495
Fundraising \$35,993







Sum of family foundation, individual contributions and earned income, divided by total income.



CHAPTERS



I've been most inspired by all the emerging leaders in RG Seattle, many of whom got involved just in the last few months, who have been jumping in head first and taking bold steps to organize: welcoming people into the chapter and making bold asks of them, joining our political action team to struggle with what political action can look like for RG, hosting events to create space for folks to build relationships, and leading our 11 praxis groups.

-lke McCreery, Seattle Chapter Leader

I joined RG for this past praxis session. In a lot of ways, my 2016 was digging in to class privilege and its intersections in my own life, and my community engagement in 2017 has been deeply impacted by my RG involvement. I've used some of the RG curriculum to start a series of community conversations in my housing co-op around equity/affordability based rent, and we've been working for a few months to determine an affordability structure that a) works and b) can be scaled. We've also started hosting a monthly giving circle for nonprofits in our community.

-Jack Teter, Denver /Boulder Chapter Leader Co-leading a POC praxis in Boston for me is about not simply leading, but growing and exploring with the other members of the praxis group - what this intersectional identity means in this city and nationwide. I am excited about growing our POC base in Boston and incorporating our cross-racial identities into the chapter's goals.

-Elizabeth Baldwin, RG Boston Coordinating Committee Member



My participation in the Triangle, North Carolina Chapter of Resource Generation has transformed the way I think about and approach organizing. It has showed me that relationshipbuilding is the core of organizing work. I used to think organizing was all about campaigns, numbers of people, and winning. Through RG spaces. I have come to realize instead that movements cannot happen without the day to day work of connecting with people or without the one to one conversations with new folks and with seasoned organizers or without the time it takes to build trust with your allies. That realization has informed the work I've done in Resource Generation, specifically, in moving our chapter to make connections with local, POCled organizations, like Southern Vision Alliance. I'm excited for our RG chapter to build upon the budding relationship we've made with SVA and show up to support their work - as volunteers, as funders, as allies.

> -Maggie Heraty, NC Chapter Leader

Seattle Portland Minneapolis/St. Paul Chicago Philadelphia Bay Area Stanford Denver/Boulder Raleigh/Durham New Orleans

EMERGING CHAPTERS

We are growing!
We are excited about
emerging chapters in
Detroit, Austin, Los Angeles,
and New Orleans.

In the Bay Area, we doubled chapter leadership and recruited 6-8 praxis leaders last year. By investing time in their leadership, we increased our capacity and that allowed us to plan two praxis groups. From those two praxis groups we recruited most of the leaders that are in leadership today. The West Coast regional retreat gave us momentum to bring a lot of those folks into more leadership, including recruiting three chapter leaders through that retreat. We went from having one chapter leader to having twelve people in leadership over the course of one year.

I feel really proud of how we've built a multiracial, vibrant network of leaders who have the capacity to organize the huge influx of constituents we have seen since November.

> -Rachel Gelman, Bay Area Member

OUT HERE IN DETROIT OUR RG CHAPTER HAS FORMED, AND IS EXCITED TO GROW! In

the past six months, Detroit RG has gathered bi-monthly to discuss personal giving plans and city-specific trends in moving money and resources. We were able to support the in-print publishing of a Detroit Social Justice Funders Guide generated by grassroots organizations and leaders across the city. We look forward to utilizing these quidelines internally and supporting their efforts to share this information with foundations and funders as they allocate resources locally. Participating in RG has changed the way that I am able to support my Mom who operates a family foundation across SouthEast Michigan on her own. The way we go about decision making is directly fueled by RG's resources, values, and relationships. We both (my Mom and I) are deeply grateful for the RG Detroit community!

> - AJ Aaron, RG Member

I knew that so many of the folks I organize with other political organizing spaces are young folks with wealth and know that if the RG-LA chapter could maximize our organizing power, we could reach so many young folks with wealth in LA towards change.

The RG-LA chapter has been building its core of members and putting together workshops people seem most interested in. We began the year with a personal budgeting workshop and held another workshop on qentrification in LA. We led into 2017 with two open houses to welcome new members into RG!

- Katie Wang,

LA chapter leader.

REGIONAL RETREATS

In 2016 we ran three Regional Leadership Retreats, based in Chicago, Oakland, and Philadelphia. The retreats brought together chapter leaders from across each region to build relationships and skills, share their best practices, hone our analysis, get inspired, and get aligned! The retreats replaced our Transformative Leadership Institute, and were designed to be accessible to a larger number of members- and they were! We had 55 member leaders attend, an increase from 35 attendees at 2015's TLI. Here's what members had to say about their experiences:



"I gained so many tools and resources during the retreat, which I am excited to bring back to my chapter."

"I loved getting to know new people, deepening relationships with my chapter and others in my region, playing, laughing, and getting a picture of RG's work both national and local."

"Getting to know other chapter leaders was so phenomenal - I'm in love."

NATIONAL CAMPAIGN WORK

CAMPAIGN SUMMIT

After a democratic member-driven process and discussions with over 40 movement organizations, we completed our 40 year campaign vision in 2016 and voted on Valuing Labor for All as our focus campaign issue area! This issue connected with a wide range of leaders stories, particularly people of color with wealth in RG, and intersects with so many struggles across communities at this moment.

Not too soon after, Trump came into power. This moment is about taking action to both build our collective freedom"and respond to the immediate threat to frontline communities in ways that help us build power and strengthen movement efforts towards our long term Valuing Labor for All campaign. So far over 100 RG members have come out publically in the streets, at city council meetings and town halls, and through local and national media towards local efforts.

We loudly reject the current path that is deepening the racial wealth divide. We know there is another way built on interdependence, collective shared power, wealth redistribution, and liberation.

RACIAL JUSTICE IN RG



VISION: We envision a world where Young Leaders of Color with Wealth are in cross-class and multi-racial community, taking collective action towards a racially and economically just world. While individual wealth may offer some safety and access to power for a select few, it cannot ensure communal safety from racialized violence by the state, corporations, or climate change. Through our powerful actions together, we can end extreme and racialized wealth inequality, and move closer to true liberation for our communities.

This year has been an amazing year for Multi-Racial Base Building in RG.

- We finalized our Vision and Purpose statements for organizing Young People of Color With Wealth-- stating boldly that we have a stake in the redistribution of wealth, land, and power.
- Member leadership of People of Color in the organization has grown tremendously, building on years of work of members, staff, board, and friends.
- Our white leaders deeply understand the need for us to be building a multi-racial organization to do this work well, and recognize that the work of doing so is all of ours.

WE ASKED OUR LEADERS

How has POC space in RG been meaningful/impactful for you?

The POC spaces in RG have been highly impactful for me both professionally and personally. It has provided a safe space to be myself more fully and explore patterns, assumptions and feelings that exist as a result of my intersecting identities. It is nearly impossible to untangle my class experience from my queer, POC identity which has always felt isolating or unsure of how to authentically show up. To have the opportunity to do that work with others who share my values has not only taught me a lot about myself and my areas of growth, but it has provided me with new community which has taken me out of the feeling of isolation. It has also been impactful to be part of growing the POC base and to feel part of a movement to recruit and invest in more young people of color with wealth

-Zak Parpia, Bay Area Praxis Leader

What are you most excited about for the future of leadership and involvement of Young People of Color With Wealth in RG?

I'm thrilled to see limay at the helm and it energizes me to know I get to witness the first young person of color with wealth Executive Director of RG. If there is ever a time where I believe in the "trickle-down" effect it's in moments like this where I believe so wholeheartedly in organizations being lead by a person of color whose values and beliefs are rooted in making space for the POC experience.

I'm also excited for others like myself to have the experience of finding community with other young people of color with wealth. Leading a POC Praxis group feels like a meaningful contribution to RG as a gesture of "paying it forward" - to hopefully be part of someone's growth and development and to continue to grow and learn alongside them.

-Elizabeth Baldwin, Boston Chapter Member

MAKING MONEY MAKE CHANGE

Making Money Make Change, our flagship conference, was held outside of Seattle, Washington this year. The conference was held shortly after the election results were in and was utilized as a place to ground, connect and strategize together. Some highlights of the conference this year include: a by request workshop on decolonization and land reparations, a member-led conversation on building a strong multi-racial base within RG, and an opt-in all people of color "pod" (small group that meets throughout the conference). There were also multiple opportunities for participants to engage with different types of activism; a storytelling board on what valuing labor means as young people with wealth, a pledge to invest in grassroots organizing and guidance on how to divest as part of #NoDAPL.

TRANSFORMING FAMILY PHILANTHROPY

TRANSFORMING FAMILY PHILANTHROPY (TFP),

our more intimate conference for young people who are or want to become part of family giving, happened in March. This is the second year in a row that Resource Generation has hosted TFP in this iteration. The retreat was three and a half days long and was a combination of political education about race, class and the field of philanthropy, personal transformation work, and

action planning. TFP 2016 was slightly different from last year's TFP, with an extra day added to focus on racial justice and political education and a daylong training called "Reflective Leadership" for small group leaders. Through our amazing partnerships we also tried out some new workshops including, "How to fundraise your family" and "Outside the box giving structures" as well as a presentation on the racial wealth divide.

PHILANTHROPY'S PROMISE ACTION BOOTH FROM TFP

At TFP, we promoted the National Committee for Responsive Philanthropy's Philanthropy's Promise, a pledge to commit at least 25% of their or their family's giving to social justice organizing. This was the first action booth we've held at TFP before, and 80% of participants signed the pledge. They collectively committed to move \$3 million dollars to social justice through their family giving, joining over 200 family foundations across the country. Talk about collective power!

"Having a community of young people to connect with about sticky family dynamics involved in trying to really implement social justice philanthropy has been so helpful. I now have friends to bounce ideas off of, instead of being stuck trying to deal with this alone."

"The workshops and presenters all had something valuable to share that I badly needed to hear. The entire program felt specifically designed and curated to my needs and to fuel the momentum I needed to change the structure of my foundation."



FAMILY PHILANTHROPY PRAXIS

The family philanthropy praxis enabled me to think broadly about all the ways that class identity and behavior characterizes the relationships in my family, which are particularly strong in the context of our family foundation. It can often feel totally unique and/or isolating, especially as a young person on a board often composed of older relatives, so the FP praxis really helped me find my voice in those conversations by being able to talk to other people running up against the same walls, and presented with the same opportunities. Thanks for making it happen!"

-Olivia Woollam, NYC Chapter

Family philanthropy can be very isolating. It's a combination of two things that are hard to talk about with other peopleintimate family dynamics and money. So having a group of people to open up to about these things, people who not only aren't judging you, but are actually coming from a similar place and can compare notes, is practically unheard of and really special. Family philanthropy praxis gave me the support to think critically about my own situation and to challenge the status quo in my family. As a result, we've moved magnitudes more resources than we otherwise would have. And that's just the initial result. I expect the long term impact of the conversations and shifts in thinking that I've initiated with the support of my praxis group to be even greater.

-Michael Schmale, NYC Chapter

FP Praxis provided me with community just as I was joining my family foundation's board. Being on a board with your family is a very weird experience! Having a group to process all of it with has made me more effective in my conversations with my family and in moving money to support social justice work. From the people in my Praxis group, I have gained a deeper understanding of what it means to organize with love.

-Sarah Frank, NYC Chapter



GIVING

MOVEMENT MATCH

In 2016, we brought back our popular Movement Match as part of our Fall membership appeal. We challenged our dues-paying members to match their gift to RG with an equal or larger gift to at least one other social justice organization or project. We do the Movement Match to ensure that even RG's own membership recruitment and internal fundraising is directly supporting and challenging members to be giving the vast majority of their money to grassroots movements.

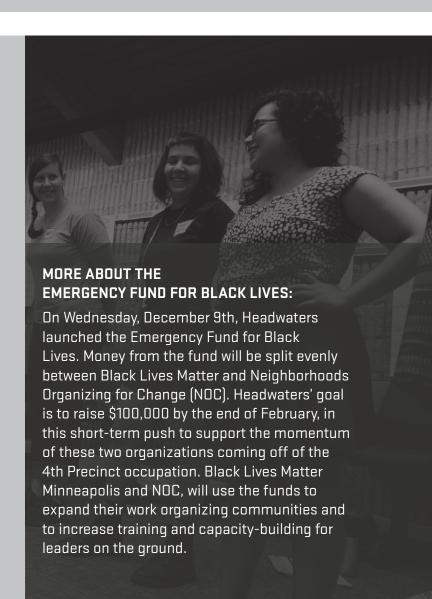
In fact, our research shows that once someone becomes a member of RG, their giving increases by 16 times. In 2016, the \$777,000 that the RG community reported moving went to a wide array of social justice organizations or projects working on immigrant, indigenous, climate, racial, economic, LGBTQ, gender and reproductive justice. This number only represents the reported individual giving during our appeal, and is only a snapshot of our membership's annual giving. Similar to the Philanthropy's Promise exercise from Transforming Family Philanthropy, we incorporated our Movement Match into our membership booth at our Making Money Make Change conference in November.

CHAPTERS

In 2016, RG chapters continued to successfully partner with their local social justice community foundations to move money through giving circles.

Western Massachusetts RG held its third annual giving circle in December 2016, raising over \$26,415 for 8 amazing people of color led organizations who are on the front lines fighting for transformative social change in the Pioneer Valley. In the past 3 years, the chapter has raised close to \$200K total through collective giving events.

Twin Cities RG raised \$7,000 for Headwaters Foundation for Justice's Emergency Fund for Black Lives at a discussion and fundraiser event in January of 2016. The event was a space to share insights, experiences, questions and inspirations about what it means to be a person with class privilege engaging in the current movement for Black liberation; in addition to making a meaningful contribution to the Emergency Fund for Black Lives.



THANK YOU

FOUNDATIONS

Quixote Foundation

The Palette Fund

Mertz Gilmore Foundation

Ford Foundation

Park Foundation

SPONSORS

Astraea Lesbian Foundation for Justice

BSW Wealth Partners

Burt Foundation

Corporate Accountability International

Newton Consulting

Fresh Pond Capital

Global Green Grants

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Natural Investments

NorthStar Asset Management

North Star Fund

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Self Help Credit Union

Social Justice Fund Northwest

Solidaire

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Third Wave Fund

Threshold Foundation

Trans Justice Funding Project

Treebeard Financial

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Alison Silveira

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Allison Harrison

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Alok Vaid-Menon

Amanda Barrett-Cox

Amanda Berthelot

Amelia Swinton

Amelia Righi

Amelie Ratliff

c/o Ratliff Family Charitable Fund

Amy Warner

Andi Cheney

Andrea Jenkins

Andrea Pien c/o Judges Walk

Family Fund at American

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Andrew Hapke

Andrew Frank
Andrew Tucker

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Anjali Bhat

Anna Weisberg

Anna Mudd

Anna Leschen-Lindell

Anne Patterson

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Anya Rous

Ari Pomerantz

Ari Wohlfeiler

Arianne Shaffer

Arielle Kihr

Armando Castellano

c/o Castellano Family Foundation

Ashley Horan

Ashley Erdman

Ashok Chandwaney

Aspen Branch-Moore

Avi Cummings

B. Lareau-Meredith

Barbara Roberts

Bayard Love

Becky Rafter Ben Blackshear Benjamin Goldstein

Benjamin Ho

Benjamin Griesinger Moniera Buck c/o Ben Moniera Fund of RSF

Social Finance

Beth Jacobs

Bettina Huber Bettny Mazur Billy Wimsatt Bonnie Rukin

Brian Lev Freedman

Brian Mitchell, Nancy Troxler

Burke Stansbury
Camilla Hammer
Camilla Johansson

Carey Hert
Carissa Knipe

Carole and Ira Pittelman

Carolyn Chou
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Cassandra Euphrat Weston

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Catherine Humphreville

Catherine Oldshue Charlie Bruce

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Chris Heavener

Christina Ellis
Christine Saffold
Christopher Abbott

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Claude Heffron

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Cynthia Beard

Dalia Rubiano Yedidia

Dan Dixon

Dan Sakaguchi Daniel Adler Daniel Backman

Daniel Apfel

Daniel Lewis
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Danya Sherman

Darsh Singh Lakhpreet Kaur

Davey Field
David Weaver
David Wolf
David Dyer

David Rosenmiller c/o Solidago Foundation

David Gast

David Roswell c/o Nandu Fund, Giving Fund DAF of Impact Assets

David Huck

David Steely & Luke Johnson

Denise Sobel Derek Lu

Devney Hamilton Devon Gamble

Diane and Don Hewat c/o Berkshire Taconic

Community Foundation

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Ed Vogel
Eli Utne
Eli Schmitt
Eli Conley
Eli Longnecker
Eliot Estrin
Eliza Parad
Eliza Hale

Elizabeth Baldwin Elizabeth Farmer Elizabeth Bidart Elizabeth Bishop Ellen Blanchard Ellie McCutcheon Ellie Wiener

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Emily Bookstein
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Emily Krumberger
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Erika Leaf c/o Erika Leaf Family Fund of the Oregon Community Foundation

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Joseph Goldkamp Josephine Merck

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Jules Burnstein Julia Snyder Julia Ho

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Julie Johnson McVeigh

Juliet Jarvis

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Kaitlin Gravitt James Norman

Karen Orrick

Karen Pittelman

Kate Poole Kate Levy

Katherine McCutcheon

Katherine D'Amato

Katherine Orr

c/o Field Cove Fund at Vanguard

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Kelly Reed

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Kylie Gursky Laura Rosbrow Laura Wernick Laura Loescher

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Siri Simons

